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Product Brief

Austrian Petfood Market

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Report Highlights: Austrian pet numbers are expected to rise in the coming years. This, and the fact that processed pet foods only make up about 40% of an average Austrian house pet's diet, indicates there is significant potential for a general increase in the pet food market. The market is supplied primarily by domestic production and imports from the EU. U.S. suppliers only have a marginal presence but U.S. brands (manufactured in Europe) are common.

Includes PSD changes: No
Includes Trade Matrix: No
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Vienna [AU1], AU

Austrian Petfood Market

Summary

It is expected that the long term increase in pet numbers will continue. Increasing numbers of older people and single households support this expectation. Due to continuously rising standards of living, households with pets will tend to buy ready made petfood. Thus, petfood consumption should rise in the long term. The Austrian market is served by large domestic production and by imports coming primarily from Germany, France, and other EU countries. There is a niche market for U.S. petfood.

A. Pet Numbers

According to 1999 statistics, in Austria there are 1.4 million cats (-7%), 581,000 dogs (+7%), 323,000 pet birds (+0.6%), 990,000 aquarium fish (+14%), and 686,000 (-9%) other pets. (Note: Comparisons are made with 1997, the most recent count before 1999.) At the same time, 26.8% of all households have one or more cats, 17% dogs, 4.5% birds, 3.5% aquarium fish and 11.2% other pets. Around 44.6% have at least one pet.

The most common birds are parakeets (178,000) followed by canaries (66,000). Among other pets, dwarf rabbits (133,000) and guinea pigs (113,000) and are predominant.

As a consequence of the rising number of single households and the rising number of older people seeking companionship, the number of pets should increase in the next few years.

B. Production

Pet food is produced by 13 factories who had a combined labor force of 563 employees in 2000. In the same year, consumption of raw material totaled 52,000 MT (-7.5% compared to 1999) of which 65% was covered by domestic production, 30% was imported from EU countries and 6% from non-EU countries. The share coming from EU countries declined compared to 1999 because of BSE restrictions in the main supplier countries. According to industry sources, practically no raw material is imported from the US.

Domestic production of pet food has been rising for a long time. It peaked at 104,600 MT in 1999 but decreased to 101,000 MT in 2000. A slight output increase is expected for 2001.

C. Market

Pet food consumption has been rising for many years. In 2000, sales by members of the Austrian petfood association were 81,000 MT of which 38% accounted for dog food, 60% for cat food, 1% for bird food, and 1% for other petfood (including aquarium fish). However, due to considerable imports by supermarket chains (non-members), actual sales are higher.

Most of the dog and cat food market is covered by Master Food, which has a production plant in Austria and covers more than 70% of the energy value of prepared dog and cat food sold in

Austria. The entire petfood market is estimated at around AS 3 billion.

Most of the canned petfood is sold in 400 gram cans and dry petfood in 0.5 - 1.5 kg boxes

It is estimated that pet food meets only about 40% of the dietary needs of Austria's dogs and 44% of cats. Many Austrians buy their petfood in form of meat scraps from butchers. This means that there is a considerable growth potential left as 80% penetration of this market should be possible in the long term. In addition, dog numbers are expected to continue to rise slightly which should further increase pet food sales.

D. Prices

Prices have been fairly stable in recent years. High standards of living and good economic will allow an increasing number of Austrians more disposable income including for petfood.

Sample prices in one of Austria's largest super market chains:

Dog food:

"Schlemmertopf" by "Quality Line": complete food containing lam, veal, beef or poultry in 400 gram cans AS 9.90.

"Pedigree" by Masterfoods: complete food containing lam, veal, beef or poultry in 400 gram cans AS 12.90.

"Frolic" by Masterfoods: dry complete food made of beef, carrots and grain in boxes of 1.5 kilos AS 45.90; boxes of 0.5 kg AS 17.90.

"Ronny Premium" by Deurer (Germany): complete food containing game, chicken or duck with vegetables in flat cans of 300 gram AS 9.90.

Cat food:

"Kitekat" by Masterfoods: complete food containing poultry and vegetables in 400 gram cans AS 8.90.

"Gourmet" by Friskies (France): complete food containing poultry and rabbit or lam and poultry or duck and turkey in 400 gram cans AS 10.90

"Whiskas Katzenschmaus" by Masterfoods: dry complete food containing poultry or beef or game in 300 gram boxes AS 15.90.

"Whiskas" by Masterfoods: complete food containing poultry or beef with vegetables in cans of 400 gram AS 11.90

Rate of exchange on August 10, 2001: \$ 1 = AS 15.27

E. Marketing Channels

Most of the pet food is sold in supermarket chains, drug stores and gas station convenience stores. The large producers supply these outlets directly. In addition, pet food is sold by veterinarians (around 1,500) and pet shops (about 350). There are 3 distributors serving pet shops, 3 serving veterinarians and 10 distributors supply 6 - 7,000 breeders. Only around 3% of dog and cat food is marketed by non-grocery stores.

U.S. petfood exporters may offer their products to the attached lists of petfood wholesalers and food wholesalers.

F. Foreign Trade and Competition

Imports show a rising trend; in 2000 they reached a value of AS 1,700 million (U.S.\$ 111 million), up 14% compared to 1999. The lion's share comes from other EU countries, followed by central European suppliers. Predominant EU suppliers are Germany (45% in 2000), France (11% in 2000), and Netherlands (10% in 2000). Around 2% came from the US in 2000. Austria is a net importer of pet food; export sales in 2000 reached AS 752 million (U.S. \$ 49 million), up 8% over the previous year.

On the Austrian market, U.S. pet food exporters face sharp competition by the large domestic production and EU suppliers, who have the advantage of short transport distances and pay no import duties. Nevertheless, there is a niche market for U.S. products. However, the currently strong dollar is a hurdle for U.S. export expansion.

G. Legal Requirements

As an animal feed, pet food is governed by the Austrian feed law number 905 of 1993, feed ordinances number 273 of 1994, number 183 of 1996, number 178 of 1999, number 93 of 2000, number 51 of 2001 and law number 22 of 2001. Legal requirements are in line with EU regulations.

Export of petfood containing animal products exports to Austria (and other EU countries) must be accompanied by a veterinary certificate. Please see the following internet address for sample APHIS export certificates for dry, canned, and semi-moist pet food exported to the European Union:

http://www.aphis.usda.gov/guidance/regulations/animal/products/international/pr_au.shtml

Registration of pet food is not required in Austria. However, if it is to be marketed in Austria, it has to comply with EU regulations. Information on pet food requirements including labeling, can be obtained from

Federal Office and Research Center for Agriculture
Spargelfeldstrasse 191
A - 1220 Vienna 22
Austria

Phone: 0043 (1) 73216/3232
Fax: 0043 (1) 73216/3303

Labeling requirements: trademark, use (for dogs, cats, etc.), composition, year and month of production, minimum shelf life.

The importation of pet food does not require any import license. However, veterinary certification according to Commission Decision 94/309/EEC and 97/199/EC is needed. Austrian petfood import regulation is fully EU harmonized.

The EU import duty is valid for Austria. For example if the starch content for dog/cat food is above 30% and the milk protein content below 10% (tariff number 2309105100), the duty rate is Euro 102/MT. With the same starch content but a milk protein content of 10 - 50%, the duty rate is Euro 577/MT. More information on customs tariffs can be obtained from the American Mission to the EU in Brussels. Contact: Hilde Brans, phone: +32 (2) 508 2760; fax: +32 (2) 511 0918; e mail: brans@fas.usda.gov

Austrian Petfood Importers/Wholesalers

Aktiva Heimtierbedarf GmbH
Voburggasse 2
A-1210 Wien
Phone: +43 (1) 2727 891
Fax: +43 (1) 2727 891 150

A.W.Barth KG
Hafnerstr. 17
A-4673 Gaspoltshofen
Phone: +43 (7735) 6557
Fax: +43 (7735) 7058

Bayer Austria GmbH, GB Vet.
Lerchenfelder Guertel 9 - 11
A-1160 Wien
Phone: +43 (1) 711 46/ 2854
Fax: +43 (1) 711 46 18

Carat Tiernahrungs GmbH
Hauptplatz 11
A-8190 Birkfeld
Phone: +43 (3174) 3615
Fax: +43 (3174) 4024

Doca Tiernahrungs GmbH & CoKG
Schneebertschgasse 3
A-6820 Frastanz
Phone: +43 (5522) 52871
Fax: +43 (5522) 52991

Garant Tiernahrung Ges.m.b.H.
Raiffeisenstrasse 3
A-3380 Poedlarn
Phone: +43 (2757) 2281 303
Fax: +43 (2757) 2281 350

Hesa Saatengrosshandlung Ges.m.b.H.
Heideaeckerstrasse 8
2325 Himberg
Phone: +43 (2235) 87391
Fax: +43 (2235) 87391 20

Royal Canin
Mariahilferstrasse 54/11-12
A-1070 Wien
Phone: +43 (1) 52 106 25
Fax: +43 (1) 52 369 31

Rupp Adolf OHG
Herrnmuehlestrasse 40
A-6912 Hoerbranz
Phone: +43 (5573) 821 27
Fax: +43 (5573) 822 68

Vitakraft H. Wuermann KG
Herziggasse 3
A-1230 Wien
Phone: +43 (1) 869 3541
Fax: +43 (1) 869 3544

Austrian Food Wholesalers, Importers, Agents, and Supermarket Chains

Company: ADEG Handels AG
Contact: Mr. Alfred Wittner
Position: Import Department
Address: Gaudenzdorfer Guertel 41-45
 A-1220 Vienna
 Austria
Tel: [+43] (1) 811 46/141
Fax: [+43] (1) 811 46 168

Company: BILLA Warenhandel AG
Contact: Mag. Erich Riegler
Position: Director for Imports
Address: Industriezentrum NO Sud, Strasse 3, Objekt 16
 A-2355 Wiener Neudorf
 Austria
Tel: [+43] (2236) 6000/5120
Fax: [+43] (2236) 6000 85120

Company: Hofer KG
Contact: Mr. Lothar Melchart
Position: Director for Imports
Address: Hoferstrasse 1
 A- 4642 Sattledt
 Austria
Tel: [+43] (7244) 8000/54
Fax: [+43] (7244) 800046

Company: Julius Meinl AG
Contact: Mr. Karl Seiser
Position: Director for Imports
Address: Am Graben 19
 A- 1010 Vienna
 Austria
Tel: [+43] (1) 532 333 416
Fax: [+43] (1) 532 333 20

Company: M-Preis Warenvertriebsgesellschaft
Contact: Mag. Anton Moelk
Position: Director for Imports
Address: Landstrasse 16
 A- 6176 Voels
 Austria
Tel: [+43] (512) 300/131

Fax: [+43] (512) 31 31 120

Company: Maximarkt GesmbH
Contact: Mag. Dr. Franz Plank
Position: Director for Imports
Address: Backermuehlweg 61
A- 4034 Linz
Austria

Tel: [+43] (732) 37 57 77
Fax: [+43] (732) 37 57 77 216

Company: Metro
Contact: Mr. Heinz Roedlbach
Position: General Manager
Address: Ortstrasse 23-27
A-2331 Voesendorf
Austria

Tel: [+43] (1) 694 6000
Fax: [+43] (1) 69 26 60

Company: Pfeiffer Grosshandel
Contact: Prok. Gerhard Lassnig
Position: Director for Imports
Address: Egger-Lienz Strasse 15
A-5040 Traun
Austria

Tel: [+43] (7229) 685/1211
Fax: [+43] (7229) 685 1310

Company: Spar Oesterr. Warenhandels AG
Contact: Mag. Gebhart Graf
Position: Director for Imports
Address: Europastrasse 3
A-5015 Salzburg
Austria

Tel: [+43] (662) 4470/23700
Fax: [+43] (662) 4470 521

Company: VOG Einfuhr & Grosshandel
Contact: Mr. Otto Bruckner
Position: Vorstandsvorsitzender
Address: Baeckermuehlweg 44
A- 4020 Linz
Austria

Tel: [+43] (7323) 738 0
Fax: [+43] (7323) 73 82 07

Company: Wedl & Dick GesmbH

Contact: Mr. Leopold Wedl

Address: Dorfstrasse 18
A-6060 Mils
Austria

Tel: [+43] (5223) 303 00

Fax: [+43] (5223) 51 57 37

company: Z-E-V Markant Zentrale Einkaufs-Vertriebs GesmbH

Contact: Prok. Manfred Gesell

Position: Director for Imports

Address: Leopoldgasse 4/1
A-1025 Vienna
Austria

Tel: [+43] (1) 21 45 695/29

Fax: [+43] (1) 21 45 695/34

Company: Maresi Naehrmittel

Contact: Mr. Gottfried Eigner

Position: Director for Imports

Address: Werdertorg. 5 - 7
A- 1010 Vienna
Austria

Tel: [+43] (1) 8000/45

Fax: [+43] (7244) 8000 46

Company: Erich Schenkel & Sohn

Contact: Mr. Erich Schenkel

Position: Director

Address: Hasenauerstr. 4
A- 1190 Vienna
Austria

Tel: +43 (1) 36 71 111

Fax: +43 (1) 36 71 112